



The Strategic Plan

2013-2014

Final Draft for Executive Committee and
Board of Director Approval

The following are the parameters within which the primary areas will develop strategies to deliver programs, products, services and activities (PPSAs).

Specific PPSA planning must be tested against the:

**VISION AND PURPOSE CRITICAL
TO SERVE CUSTOMER
AREAS, STRATEGIC GOALS AND STRATEGIES**

The Arizona Association of REALTORS® Vision:

REAL Solutions, REALTOR Success

The Arizona Association of REALTORS® Purpose:

Our purpose is to assist our members become the best prepared real estate professionals with the highest standards.

The AAR Customer:

The Association has many customers which are the direct recipients of the Association's programs, products, services and activities as follows:

- A. Members in good standing*
- B. Local Associations*

This plan is the result of an intensive, one and one-half day Leadership Planning Summit held Thursday and Friday, April 26 & 27, 2012 in Sedona, Arizona.

The 26 participants included AAR officers, directors and committee chairs, local association leaders and key management staff. A professional facilitator with extensive Realtor® association management experience was engaged to guide the group in developing the plan.

By the time the conference concluded, the group had established six primary areas of concentration each with a strategic goal and specific strategies to accomplish for the association. This strategic plan was created as a foundation so that future planning sessions, if necessary, need only concentrate on current programs and not re-building the strategic plan.

Introduction

A critical first step in the planning process is to ensure the planners are thoroughly familiar with the organization and the market environment in which it operates. This was accomplished through several methods:

- A briefing on the “state of the association” by AAR CEO Tom Farley
- President-elect Sue Flucke gave an overview of what she would like to see achieved during her tenure as President which is to “exceed expectations”
- Facilitator Adorna Carroll asked each participant what they wanted to “get out” of the planning session then proceeded to inform the group on how the session would flow, what she expected and what trends she is aware of nationally.

DETERMINATION OF AREAS OF CONCENTRATION

The Facilitator worked with the group to determine which areas of the Association provide benefits to its customers. In short, the participants were asked to think outside of the box and illuminate major areas as opposed to committees, programs or services. Once those areas were determined, the participants worked in groups to develop a strategic goal for each area. From there, the participants were able to design strategies with assigned tasks to attain the strategic goals.

While the development of these areas, goals, strategies and tasks are too extensive and wide-ranging to be recounted in this report, they became the basis for the strategic plan and for the recommendations developed for the 2012 leadership’s consideration. The 2012 Strategic Planning Session participants are very proud of THE plan they have created for the Arizona Association of REALTORS® and praise must be given to Adorna Carroll for “holding their feet to the fire” to complete this task.

THE STRATEGIC PLAN

AREA 1: MEMBER COMMUNICATIONS AND OUTREACH

Purpose: Communicate the right message to the right people in methods that reach out, inform and engage the membership

Strategic Objective 1: Create and maintain a consistent system of communication management (including methods of communication and options for communication delivery)

Strategy 1.A.: Identify members preferred communication method (electronic, snail mail, social media)

Strategy 1.B: Continually assess the effectiveness of AAR's communication vehicles and seek out new or under-utilized channels

Strategy 1.C: Manage and integrate the communications vehicles and technologies to ensure a streamlined member experience

Strategy 1.D: Establish a system that builds collaboration among the primary committees to effectively keep leadership and membership updated on AAR's activities.

Strategic Objective #2: Disseminate pertinent relevant, timely industry information

Strategy 2.A: Stay abreast of and communicate trends to the membership

Strategy 2.B: Provide easy access to all the AAR benefits: programs, products, services

Strategy 2.C: Improve AAR website including making the site more interactive and streamlines the member experience and supports member relationships

Strategic Objective #3: Increase effectiveness of AAR's efforts to reach out to members

Strategy 3.A: Evaluate AARs communication staff and volunteer structure to ensure the most effective structure is in place.

Strategy 3.B: Develop and utilize an effective member outreach program

Strategy 3.C: Employ strategies to ensure members know and understand AAR's value package

Strategy 3.D: Emphasize communication that inspires member confidence in programs, products and services

AREA 2: PROFESSIONAL DEVELOPMENT

Purpose: AAR delivers preeminent educational programs and resources that position those AAR members desiring to succeed in the real estate industry

Strategic Objective 2A: AAR provides the ultimate in REALTOR post licensing education

Strategy 2.A.1: Develop curriculum for brokers, managers specific for all business specialties (residential, property management, commercial/industrial)

Strategy 2.A.2: Develop curriculum that meets AAR course certification criteria (broker management clinics, salesperson training –basic skills/advanced)

Strategy 2.A.3: Identify and train instructors must meet AAR instructor certification standards

Strategy 2.A.4: Expand instructor ratings and reviews (REteach)

Strategy 2.A.5: Develop cross marketing strategy using CE courses to promote for fee programs

Strategy 2.A.6: Educate instructors to use CE courses as a springboard to up-sell higher education

Strategy 2.A.7: GRI: incorporate introductory designation and certification courses into the GRI curriculum (two fers)

Strategy 2.A.8: Designation/certification: identify and incorporate a wide spectrum of graduate level education

Strategic Objective 2.B: AAR evaluates the effectiveness, structure and format of the GRI program

Strategy 2.B.1: New task: utilize focus groups, surveys, etc to conduct assessment

Strategic Objective 2.C: AAR utilizes the most effective education delivery

Strategy 2.C.1: Utilize remote delivery methods (2nd life, real life)

Strategy 2.C.2: Obtain a robust online education platform system to deliver AAR's online education

Strategy 2.C.3: Deliver education through emerging technologies, medias and platforms, including a mobile calendar app

Strategy 2.C.4: Utilize professional marketing services resulting in substantially increased course attendance

Strategic Objective 2.D: AAR provides a spectrum of services to brokerages/owners to enhance their business

Strategy 2.D.1: Broker needs assessment

Strategy 2.D.2: Expand “my broker coach”

Strategy 2.D.3: Provide in office broker audit simulations

Strategy 2.D.4: Provide broker toolkits to brokers

Strategic Objective 2.E: AAR maintains a cadre of qualified educators in the industry

Strategy 2.E.1: Expand instructor participation in the instructor certification program

Strategy 2.E.2: Promote and Offer IDWs to enhance instructor teaching

Strategy 2.E.3: Create and implement improved instructor communication to and between them

Strategy 2.E.4: Enhance instructor directory to include the student ratings on their profile

Strategic Objective 2.F: Develop subject matter assessments to ensure instructor masters subject they are teaching

Strategic Objective 2.G: AAR provides development opportunities/tools/programs specific for state and board leadership

AREA 3: GOVERNMENT AFFAIRS

Purpose: the Arizona Association of REALTORS[®] is the most powerful and influential political force in Arizona

Strategic Objective 3.A: Proactively advocate and protect private property rights

Strategy 3.A.1: propose legislation to enhance AAR's legislative policies...

Strategy 3.A.2: Actively monitor proposed legislation that affects private property rights and real estate industry

Strategic Objective 3.B: AAR is armed with the most knowledgeable advocates

Strategy 3.B .1: AAR optimizes member knowledge base

Strategy 3.B.2: Cultivate strong grass roots in each local association for statewide impact

Strategy 3.B.3: Cultivate strong industry and non industry knowledge base and resources

Strategy 3.B.4: Utilize NAR and industry resources

Strategic Objective 3.C: AAR leverages influential relationships

Strategy 3.C.1: AAR fosters and educates policy makers

Strategy 3.C.2: Create and strengthen strategic alliances

Strategy 3.C.3: Identify and develop potential policy makers/candidates

Strategic Objective 3.D: AAR inspires and capitalizes member political contributions and efforts

Strategy 3.D.1: AAR ignites member involvement and united voice

Strategy 3.D.2: (RPAC, RAPAC, realtor pride, electoral process, issues mobilization)

Strategy 3.D.3: Strategically distributes political resources by empowering the appropriate AAR bodies

Strategy 3.D.4: Instill a culture and tradition of political activism

AREA 4: GOVERNANCE AND OPERATIONS

Purpose: AAR is a member driven professional organization that delivers fiscal responsibility, functions within a fluid operational structure, responsive governance model and collaboratively partners with local and the national association to anticipate and satisfy member needs.

Strategic Objective 4.A: AAR is an effective manager of the member's finances

Strategy 4.A.1: Negotiate the best pricing possible for products, programs and services

Strategy 4.A.2: Analyze cash flow, expenses regularly to support association financial goals

Strategy 4.A.3: Responsive to economic cycles

Strategy 4.A.4: Create AAR Executive Policy #20 allowing for the reallocation of budgeted expenses to other programs, products and services.

Strategic Objective 4.B: Corporate Structure: AAR is a member directed non-profit corporation

Strategy 4.B.1: Review bylaws/policy, ensure authority, accountability and relevance to the association

Strategy 4.B.2: We regularly evaluate organizational structure to provide the highest and best use of talent and resources

Strategy 4.B.3: Recruit, develop and retain the best of the best staff and volunteers

Strategic Objective 4.C: Operations - AAR runs a tight ship

Strategy 4.C.1: Products, programs and services are delivered within or under approved budget

Strategy 4.C.2: Recommend that the President appoint a PAG to recommend timelines for critical association issues to be addressed.

Strategic Objective 4.D: Association Relations - AAR is regarded as an influential voice and partner to local, state and NATIONAL ASSOCIATION OF REALTORS[®]

Strategy 4.D.1: AAR provides collaborative guidance and resources for local associations to assist them in reaching their goals.

Strategy 4.D.2: AAR is a consultant to and with other state REALTOR[®] Associations

Strategy 4.D.3: AAR is a respected partner within Region 11

Strategy 4.D.4: AAR members and staff serve as leadership at the national level

Strategy 4.D.5: AAR members and staff will seek out and establish relationships with like minded industry partners.

Strategic Objective 4E: AAR offers a value package that helps increase the efficiency and profitability of our members

Strategy 4.E.1: AAR clearly delineates and expresses the value proposition

Strategy 4.E.2: AAR leverage economies of scale to cultivate strategic alliances

Strategy 4.E.3: AAR will work to identify partnership opportunities

Strategy 4.E.4: AAR will seek agreements, based on sound business decisions to AAR, that benefit its members

AREA 5: RISK MANAGEMENT

Purpose: AAR provides members unsurpassed risk management tools

Strategic Objective 5.A: AAR forms establish the standard of care in the industry

Strategic Objective 5.B: AAR maintains claims statistics to identify liability trends

Strategic Objective 5.C: AAR maintains comprehensive and accessible legal information for member use

Strategic Objective 5.D: AAR provides a program for early and effective claims resolution

Strategy 5.D.1: Foster alliances with defense attorneys, E&O carriers and mediators

Strategic Objective 5.E: AAR is proactive and progressive in how it disseminates risk management information

Strategic Objective 5.F: Promote laws that reduce member liability

Strategy 5.F.1: Explore designated agency

Strategic Objective 5.G: Format Business Plan for additional Legal Counsel

Strategic Objective 5.H: Risk Management Information/Education

Strategy 5.H.1: Explore ways that RMC members and Leadership can deliver risk management information

Strategy 5.H.2: Create a scenario based education forum

Strategic Objective 5.I: Promote laws that reduce member liability

Strategy 5.I.1: Establish a regulatory agency work group.

Strategic Objective 5.J: AAR develops an effective Legal Hotline

Strategy 5.J.1: Evaluate an In-House Legal Hotline

Strategy 5.J.2: Evaluate the possibility of offering access to the Legal Hotline to ALL members

Strategic Objective 5.K: AAR provides unsurpassed Professional Standards enforcement and ongoing training program

AREA 6 BUSINESS SERVICES

Purpose: Provide business products and services to support the success of REALTOR members.

Strategic Objective #6.A: Investigate and provide products and services that increase efficiency and profitability of member business operations

Strategy 6.1.A: Monitor and investigate industry programs and products and services to possible partnership for AAR members

Strategic Objective #6.B: Manage and support integration between all technologies, as appropriate

Strategy 6.B.1: Continually review, evaluate, filter and vet AAR's technologies

Strategy 6.B.2: Provide technology support for all AAR programs and staff

Strategy 6.B.3: Manage life cycle of core technologies.

6.B.3.A: Release of products

6.B.3.B: Maintenance and support of product

6.B.3.C: Develop and deploy end of life cycle plans for core technologies

Strategy 6.B.4: ARBI is deployed in phase per development guidelines to the membership.

Strategic Objective #6C: Provide a source for a consolidated licensing service

Strategy 6.C. 1: Develop and utilize e-commerce capabilities

Strategy6.C.2: Investigate the feasibility of creating an e-store

Strategic Objective #6.D: Investigate the feasibility of creating a one-stop licensing services (ADRE. CE renewal, non-dues income from non dues members)